



ICIS Reports – Best Practices Business Objects XI – 3.1

October 2009

Office of Compliance
Office of Enforcement and Compliance Assurance
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Washington, D.C. 20460

<http://www.epa.gov/compliance/data/systems/icis/best-practices-for-boxi-31.pdf>

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INTRODUCTION	

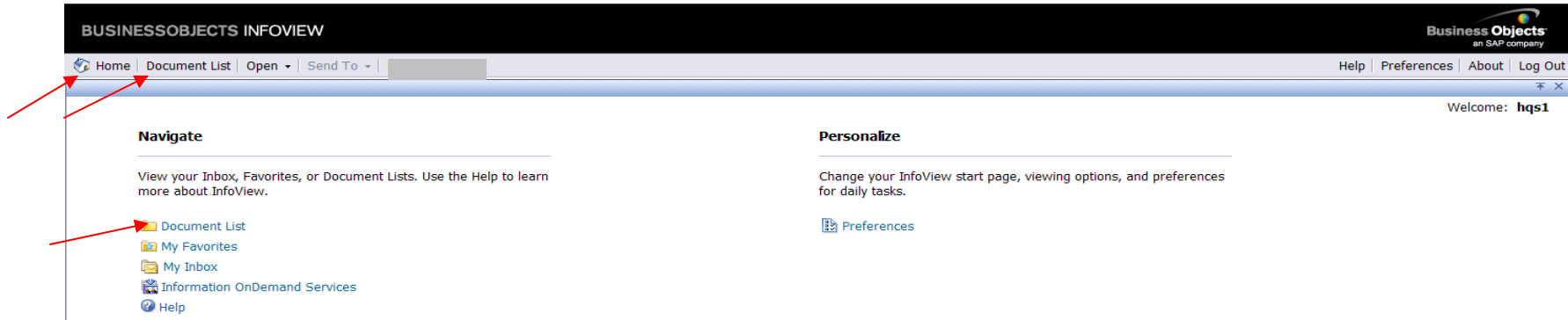
Purpose

The purpose of this document is to provide guidance to the ICIS users with resolutions to some common reporting questions, to offer tips for performing everyday reporting tasks, and describe some of the new features of Business Objects XI 3.1.

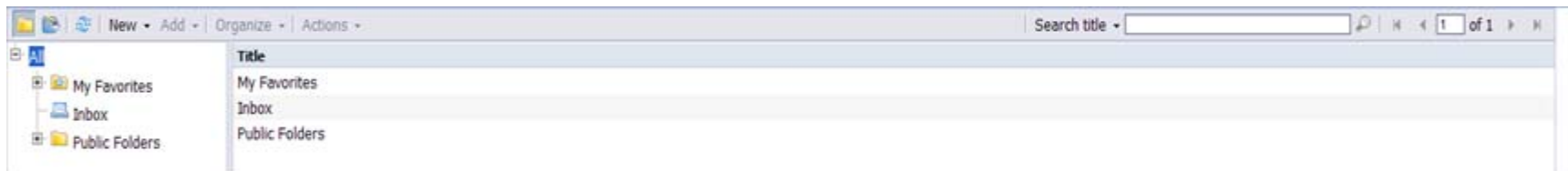
New Look of XI 3.1

1. Navigation

Infoview has a new look and feel in BusinessObjects XI 3.1. When you click on the “Reports” link in ICIS, the screen below will appear. Click the ‘**Home**’ icon in the left corner or click “**Document List**” in the toolbar or under “**Navigate**” to get to the following screen:

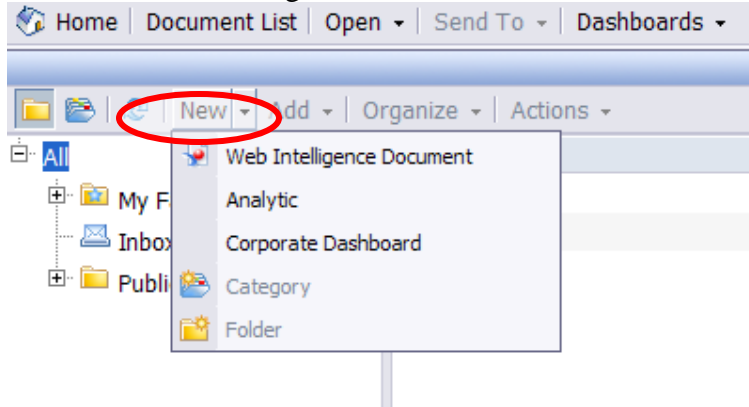


The screen below will appear when you click one of the options shown above. From this screen, you can navigate to your Favorites or Inbox documents. You can also expand Public Folders to access the ICIS standard reports.



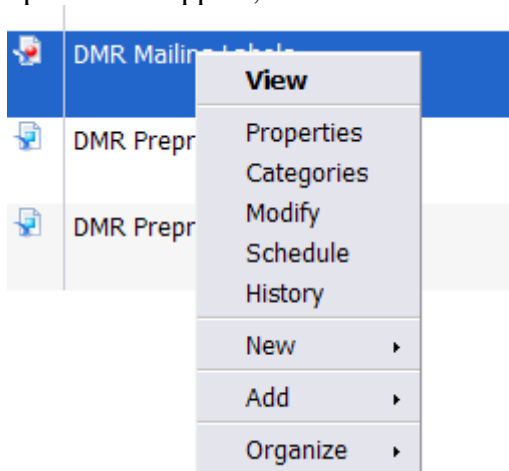
2. Access Web Intelligence

To access Web Intelligence, Click “New” in the InfoView toolbar and select Web Intelligence Document from the drop down



3. Running Reports

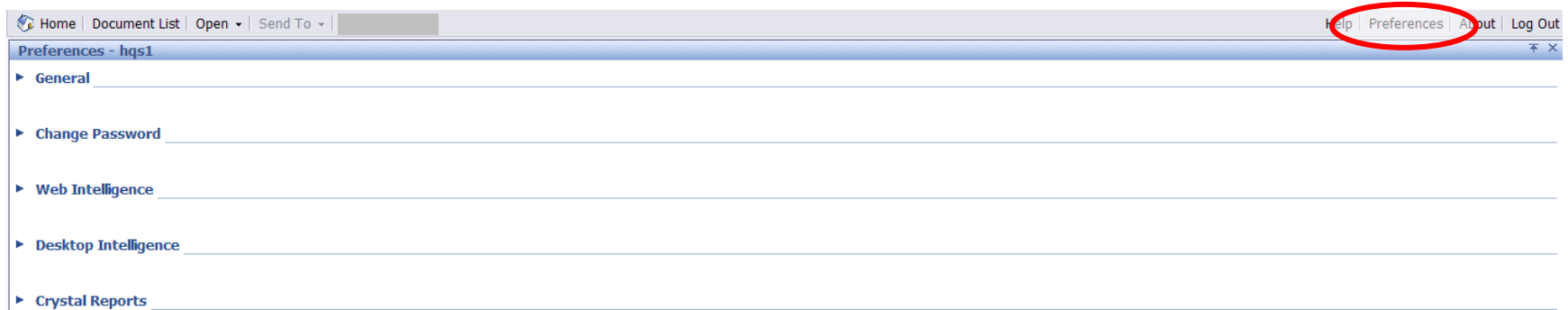
To run a report, navigate to the report and double-click the report name. For other options, right click on the report name, the available options will appear, see below:



Setting Preferences

You can set preferences for various categories; such as Desktop Intelligence or Web Intelligence.
Select Preferences in the top right corner to access these options.

Your Preferences will be imported from the current version of BusinessObjects XI. If you have modified your preferences in production, those preferences will be set in the new version.



1. Setting Web Intelligence Preferences

This is a personal preference, Web or PDF are the recommended options, Web is the default setting.

Select a default view format:

- ☐ Web (no downloading required)
- ☐ Interactive (no downloading required)
- ☒ PDF (Adobe AcrobatReader required)

2. Setting Desktop Intelligence Preferences

This is recommended to set your default format to PDF. Desktop Intelligence reports do not display properly if they are not viewed in PDF format. Web is the default setting.

Select a default view format:

- ☐ Web (no downloading required)
- ☒ PDF (Adobe AcrobatReader required)
- ☐ Desktop Intelligence format (Windows only)
(Desktop Intelligence required)

After the preferences are chosen click 'OK' or '**Apply**' button to apply these preferences.

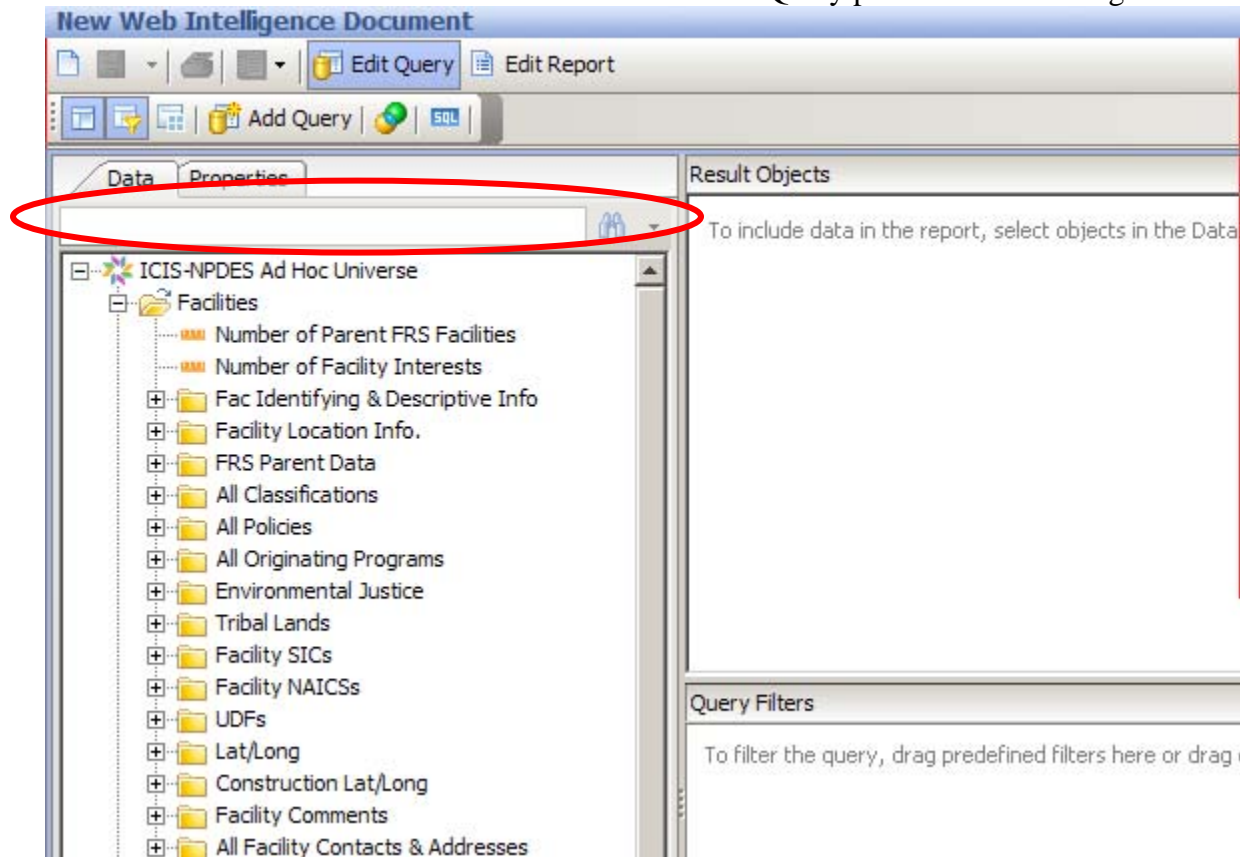
3. Change Password Preference

Change password does not display any options to modify password. The password can only be modified via the ICIS Application.

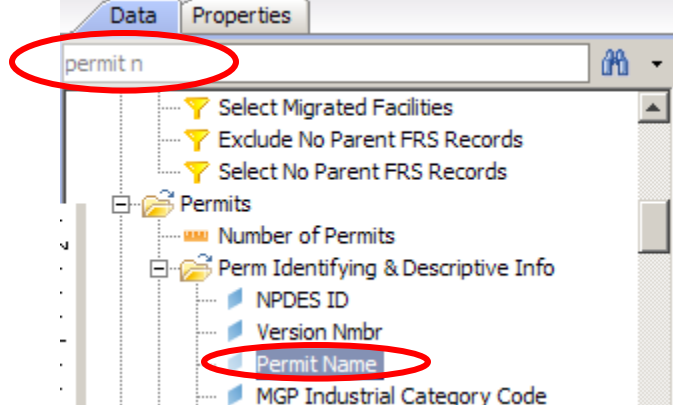
New Functionality in Web Intelligence

1. Search for objects in the Universe

If you know the name of your object but are unsure where to find it, you can search for it by entering the name of the object in the search field circled below. This is found within the Edit Query panel in Web Intelligence.

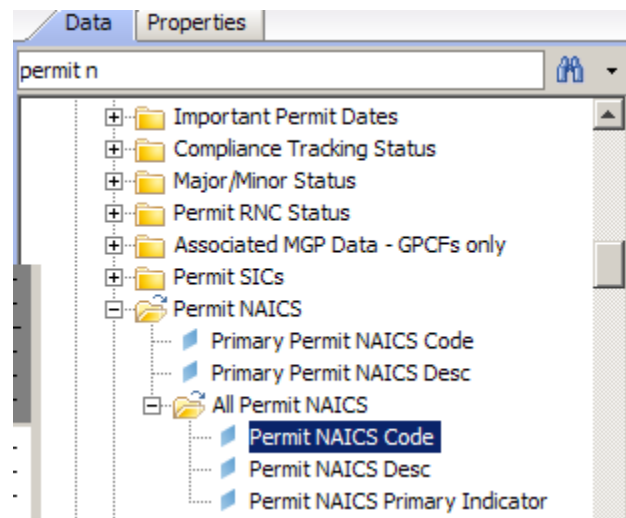


The search does not handle wild cards and will not return results unless the string entered matches the beginning of a string in one of the objects. For Example, if I enter “**permit n**”, the search takes me to the “Permit Name” object. If I enter “**name**” into the search field, the “**Permit Name**” object will not be found, only objects that start with “**Name**” will be found.

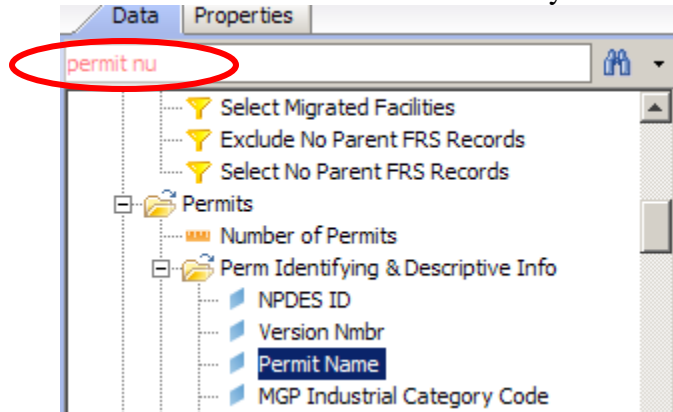


If I continue to hit enter after an object is found, the search will bring me to the next object that contains the search criteria.

For Example: Enter “**permit n**” into the search field, the first object found is “Permit Name”, hit enter one more time, the next object found is “Permit NAICS Code”, continue to search by hitting enter until the object you are looking for is found.

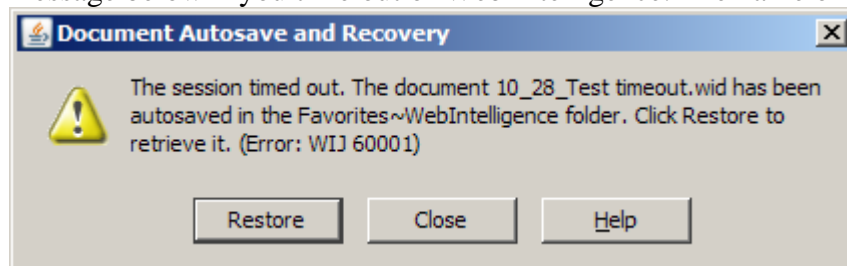


If I enter a search that doesn't have any matches, the text will turn red, indicating no match was found



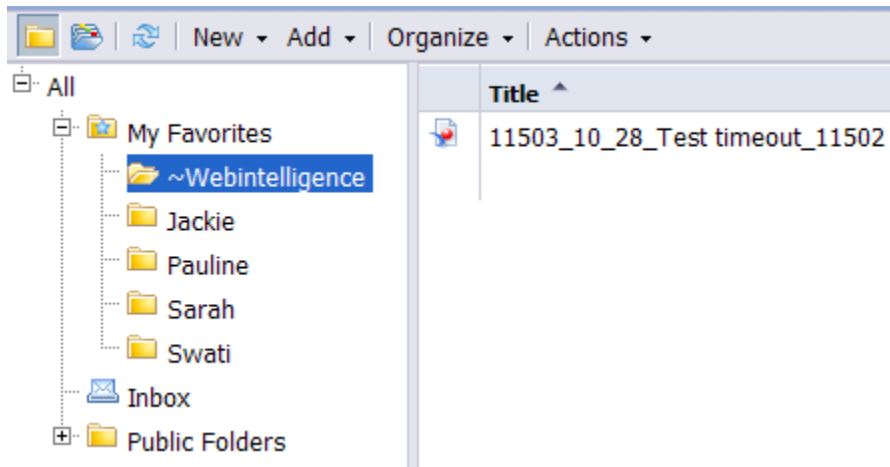
2. Auto Save

If your session times out while you are in Web Intelligence your report will be saved so changes will not be lost. You will see the message below if you time out of Web Intelligence. The name of your document will be in place of “10_28_Test timeout.wid”

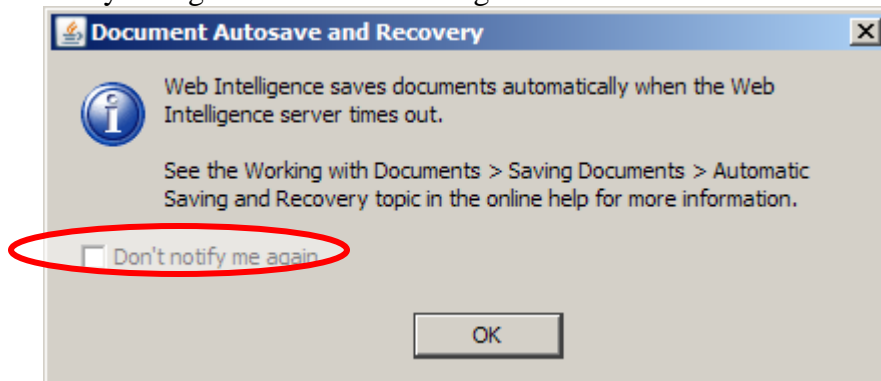


You can retrieve the saved copy of your report in your “Favorites” folder, in a subfolder called “**~Webintelligence**”. Your report will be saved in that folder. If you did not name your report before timing out, you will see something similar to ‘1_New Web Intelligence Document_7973’. If your report named before timing out, you will see the name of your report with a numbers appended to the name. These are system generated numbers that will be appended to the beginning and ending of the report name.

Below is an example of where these documents are stored:

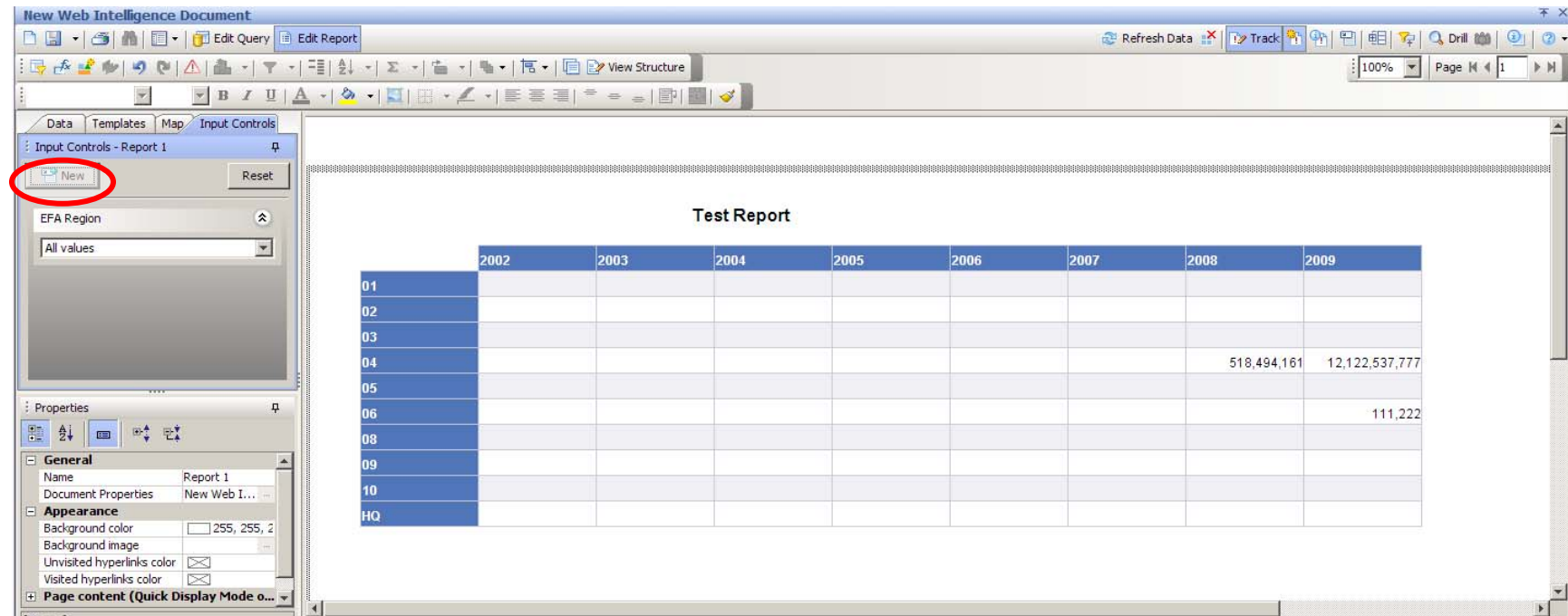


Web Intelligence will display the message below, to inform you of the Autosave feature. This can be turned off by checking the “Don't notify me again” box and selecting “OK”

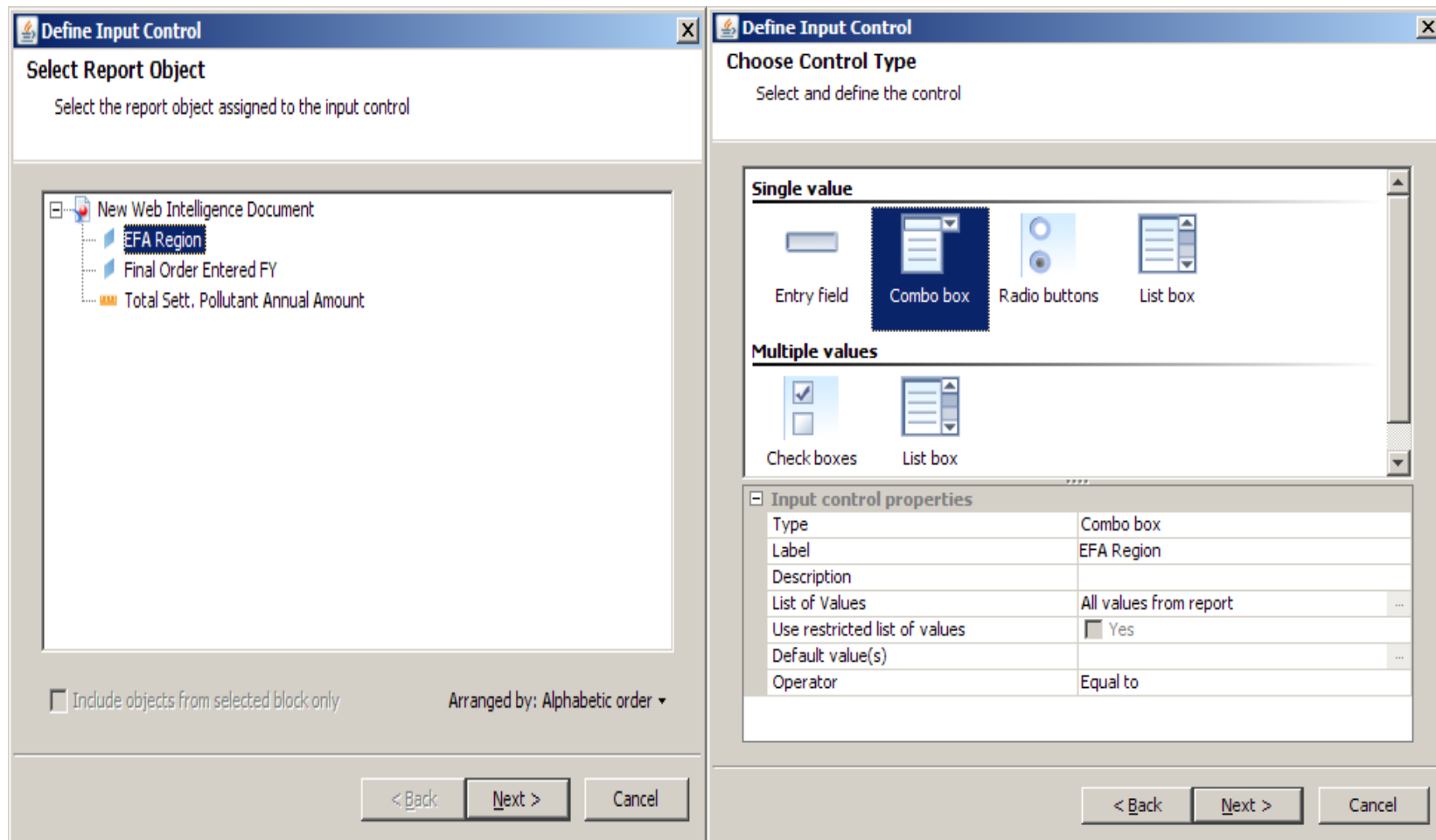


3. Input Controls

The Input Controls in Web Intelligence documents allows users to filter data quickly and easily for analyzing the information before applying a filter.

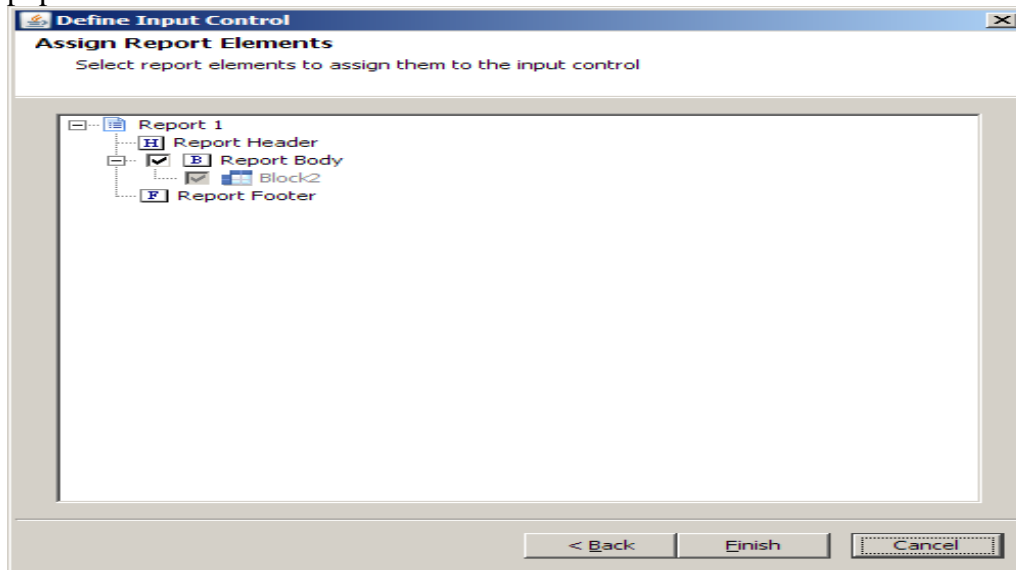


Go to Edit Report to create a new Input Control. Click on 'New' then select 'EFA Region' and click 'Next'.



Select one of the Control Type, for e.g. Combo box. The properties can be modified based on the requirement.

The Default **'Report Body'** is selected as it is the only one in the report. Click on **'Finish'**. The Input control is displayed with values populated.



Input Controls - Report 1

New Reset

EFA Region

All values

All values

01

02

03

04

05

06

08

Properties

General

Name Report 1

Document Properties New Web I...

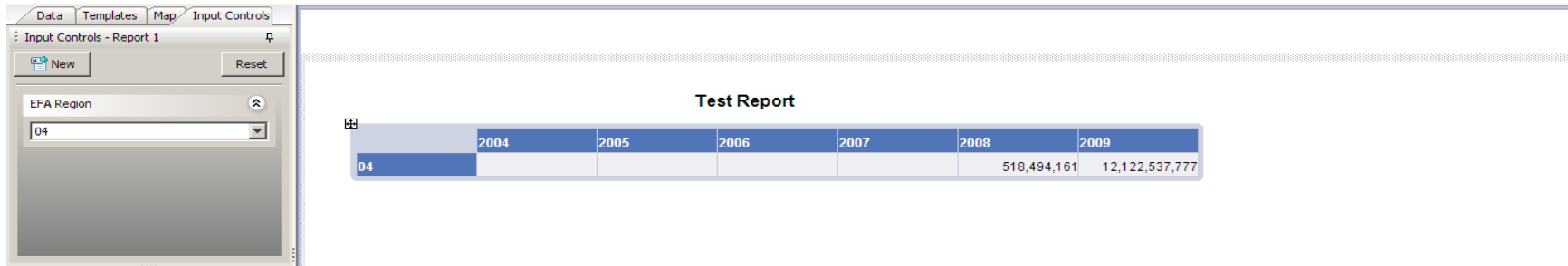
Appearance

Background color 255, 255, 2

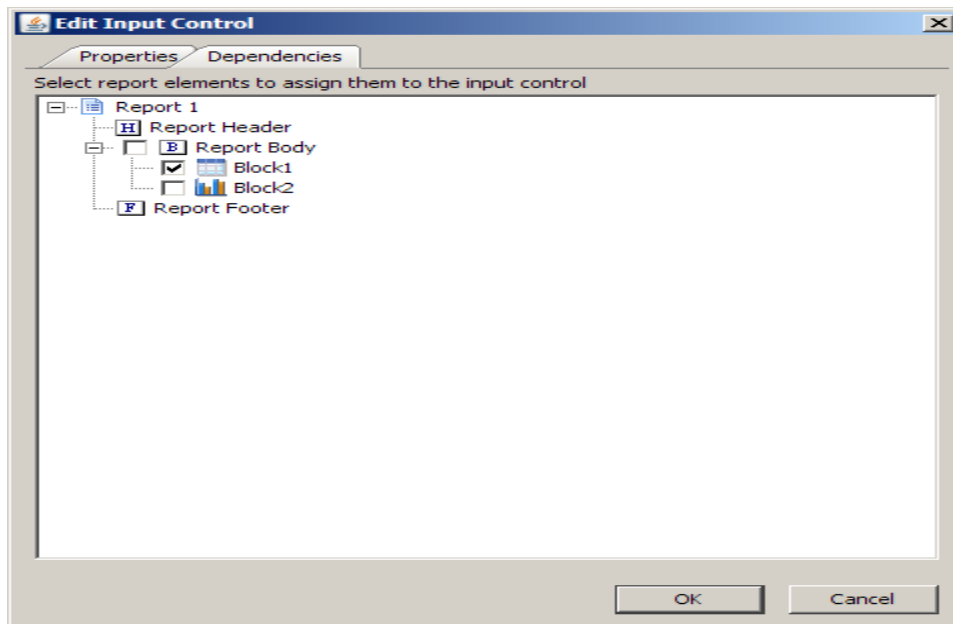
Test Report

	2002	2003	2004	2005	2006	2007	2008	2009
01								
02								
03								
04							518,494,161	12,122,537,777
05								
06								111,222
08								
09								
10								
HQ								

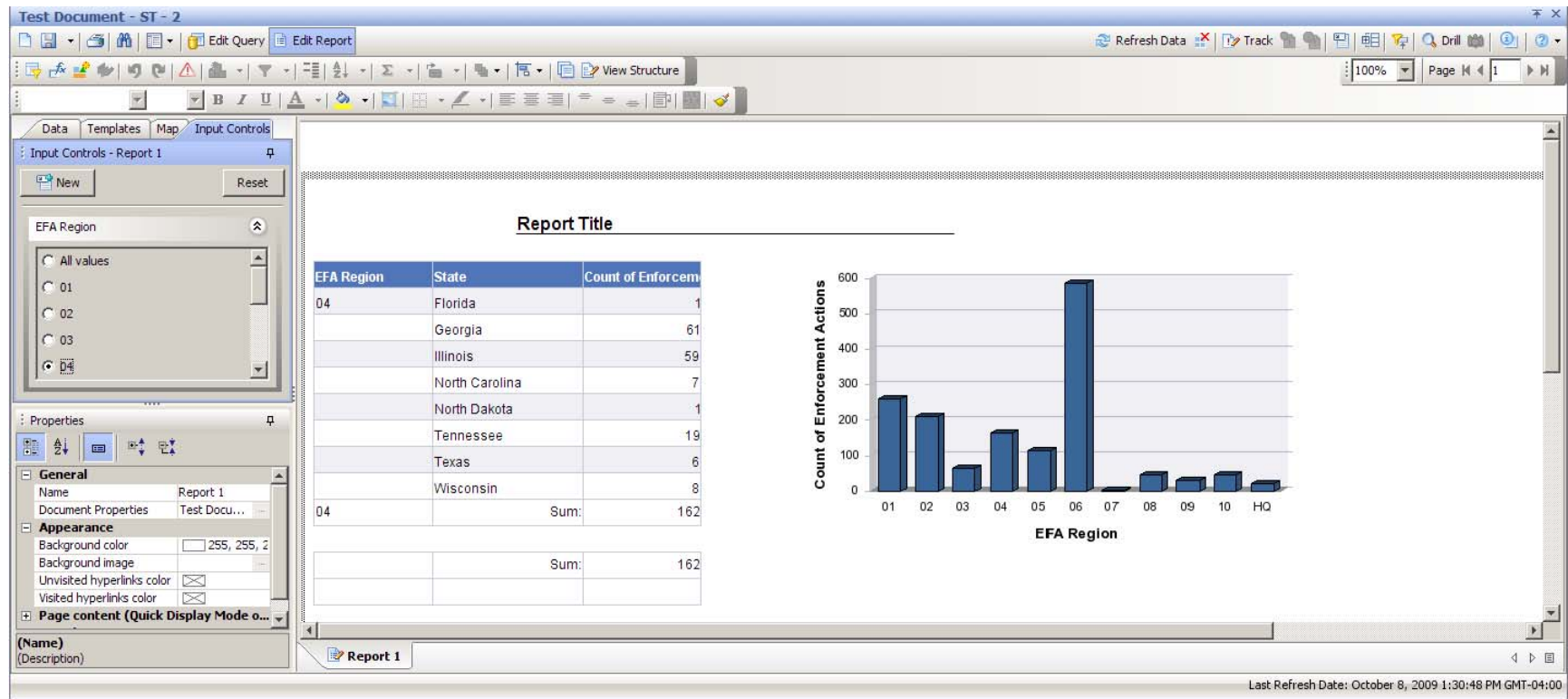
When a value is selected in the input control, the filter gets applied to only one block. The input control filter can be applied to the entire report or specific blocks within the report. The dependencies tab allows selecting one or multiple blocks for which the input control should apply.



In the following example, input control is present on Region Code but there are two blocks in the report. The input control is applied to only one block to view the data for only one region whereas the Chart shows data for all the regions.

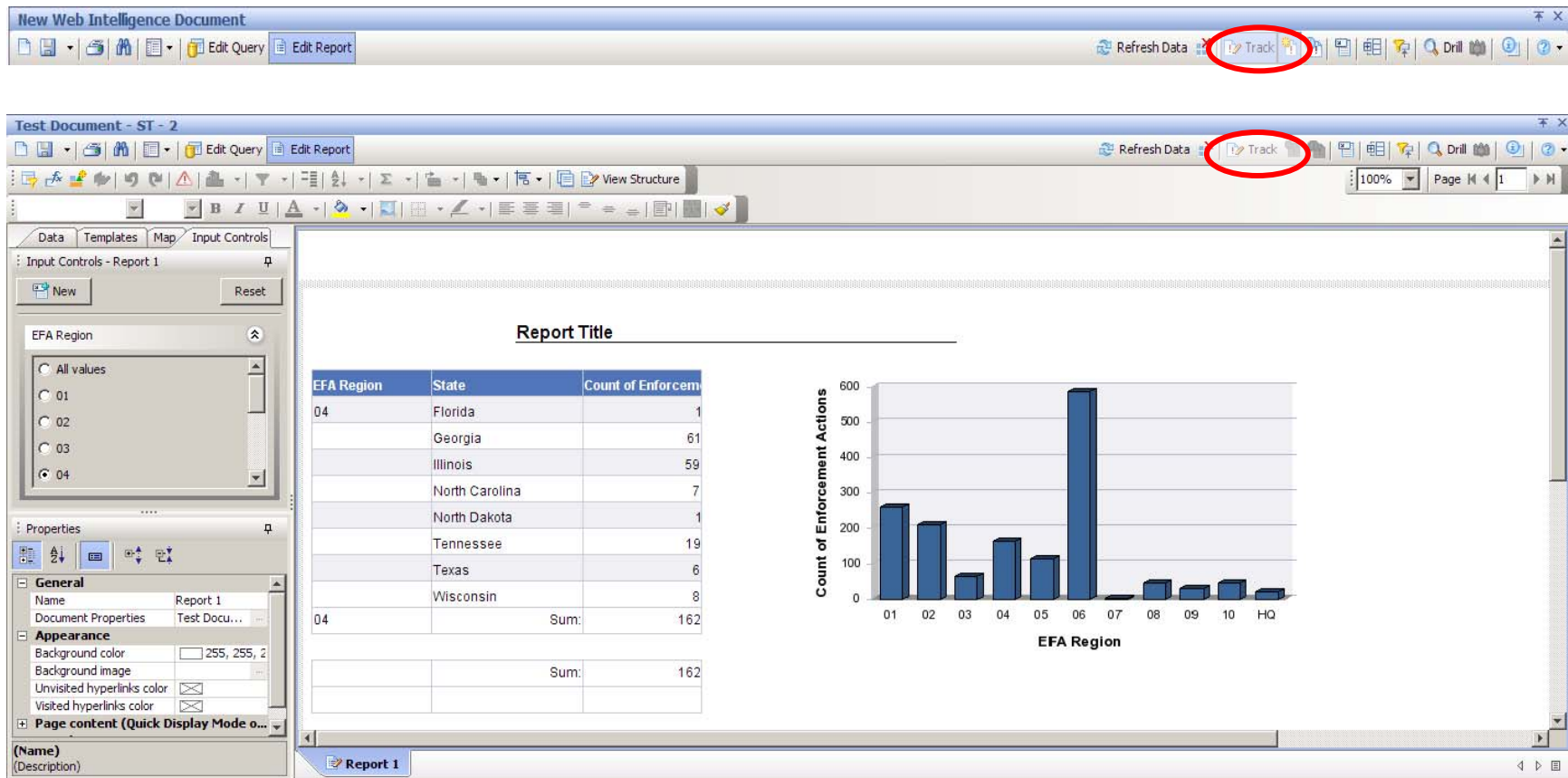


ICIS Reports – Best Practices XI 3.1



4. Tracking Data

Data changes can be tracked in a report using the Track button for a quick review and the changed data is highlighted in different colors when the report is refreshed.

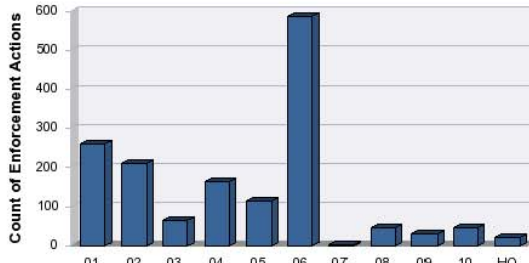


The screenshot shows the ICIS Reports interface. The top toolbar includes buttons for 'Refresh Data' and 'Track', with the 'Track' button highlighted by a red circle. The main report area displays a table and a bar chart.

Report Title

EFA Region	State	Count of Enforcement
04	Florida	1
	Georgia	61
	Illinois	59
	North Carolina	7
	North Dakota	1
	Tennessee	19
	Texas	6
	Wisconsin	8
04	Sum:	162
	Sum:	162

Count of Enforcement Actions



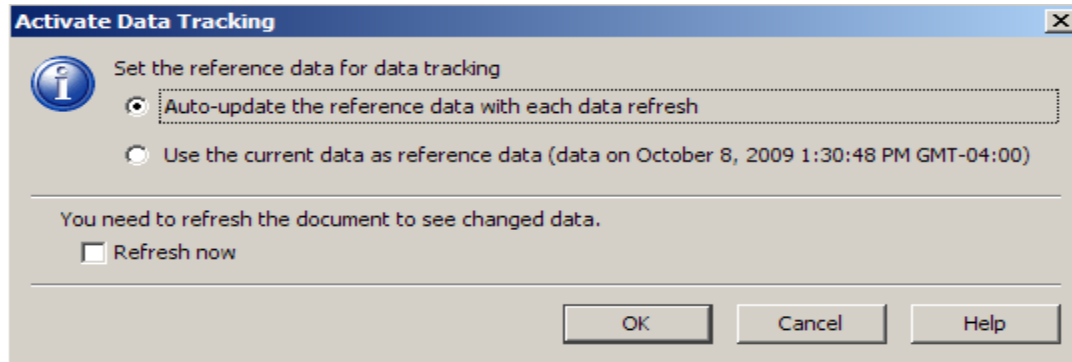
EFA Region

Click on the **'Track'** to track the changes in the report data.

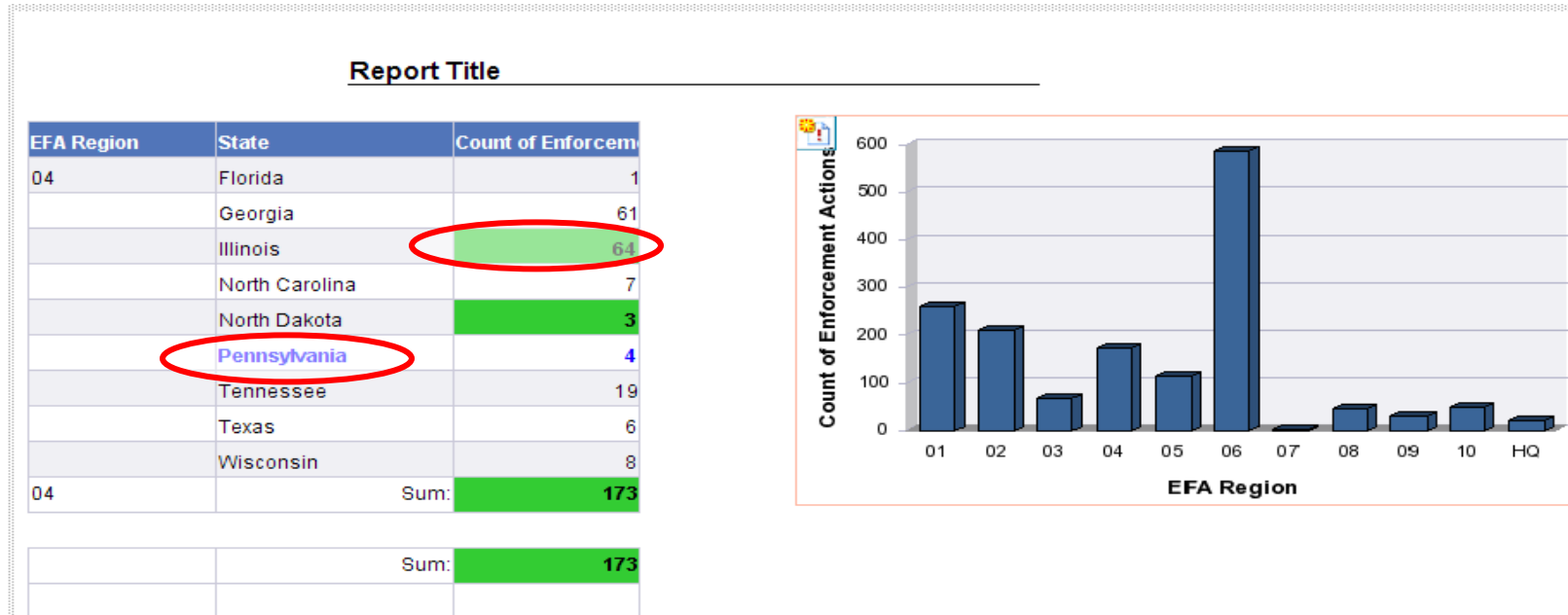
The data can be tracked in two different modes.

a) When Auto-update the reference data with each data refresh is selected which is the default, the report always shows the difference between the most recent data and the last refreshed data.

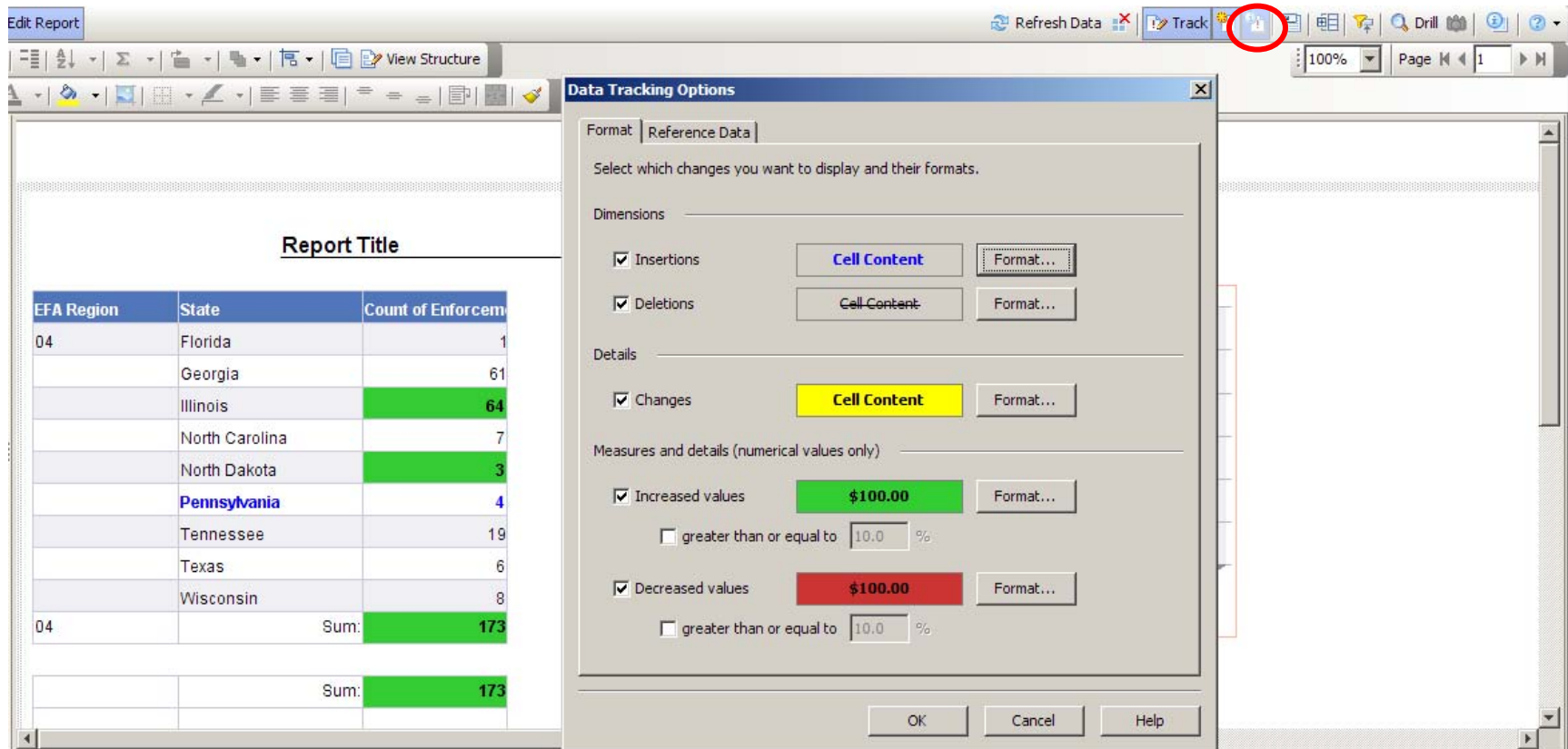
b) When ‘Use the current data as reference data’ is selected, which is the manual tracking mode; the report always shows the difference between the most recent data and the fixed reference data.



The color coding allows you to recognize the changes in the data whether it is modified, added or deleted. In this case, **Green** color in the Count column shows that the data value has increased and the **Blue** color of the value shows that the data has been added.



Click on the 'Data tracking Options' icon to configure the appearance of the modified data. Click on the Format tab to specify the font, color and size of the modified data



The screenshot shows the ICIS Reports application window. The main window displays a report titled "Report Title" with a table of enforcement data. The table has three columns: "EFA Region", "State", and "Count of Enforcement". The data is as follows:

EFA Region	State	Count of Enforcement
04	Florida	1
	Georgia	61
	Illinois	64
	North Carolina	7
	North Dakota	3
	Pennsylvania	4
	Tennessee	19
	Texas	6
	Wisconsin	8
04	Sum:	173
	Sum:	173

The "Data Tracking Options" dialog box is open, showing the "Format" tab. The dialog box has two main sections: "Dimensions" and "Details".

Dimensions:

- ☒ Insertions: Cell Content (Format...)
- ☒ Deletions: Cell Content (Format...)

Details:

- ☒ Changes: Cell Content (Format...)

Measures and details (numerical values only):

- ☒ Increased values: \$100.00 (Format...)
 - ☐ greater than or equal to 10.0 %
- ☒ Decreased values: \$100.00 (Format...)
 - ☐ greater than or equal to 10.0 %

The dialog box has "OK", "Cancel", and "Help" buttons at the bottom.

The 'Reference Data' tab allows users to modify the reference option in the report data tracking.



The image shows a 'Data Tracking Options' dialog box with a close button (X) in the top right corner. It has two tabs: 'Format' and 'Reference Data', with 'Reference Data' being the active tab. The main area contains the instruction 'Select the reference data you want to use for comparison;' followed by two radio button options. The first option is 'Auto-update the reference data with each refresh'. The second option is 'Use fixed reference data from:' followed by a dropdown menu showing 'October 8, 2009 1:30:48 PM GMT-04:00'. At the bottom, there is a 'More Information' section with a question mark icon and a text box containing the instruction 'Use this dialog box to change the reference data and to define the cell formats used to display changed data.' Below this is a 'More Information' link. At the very bottom are 'OK' and 'Cancel' buttons.

Data Tracking Options

Format | **Reference Data**

Select the reference data you want to use for comparison;

☐ Auto-update the reference data with each refresh

☒ Use fixed reference data from: October 8, 2009 1:30:48 PM GMT-04:00

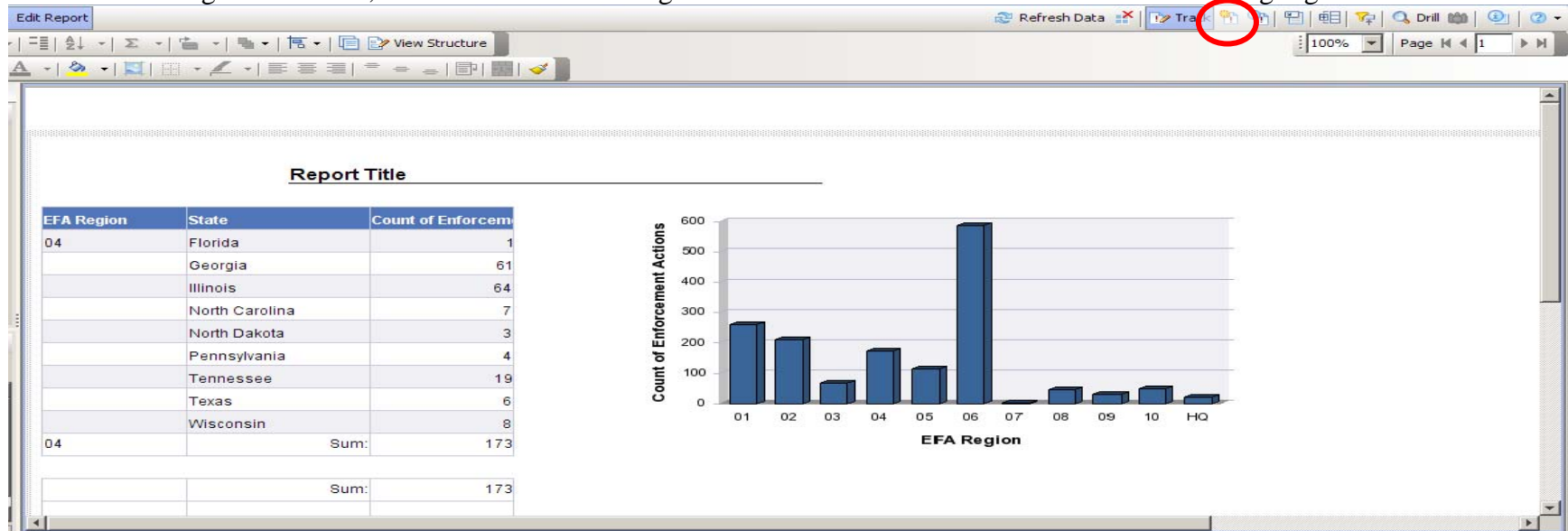
? More Information

Use this dialog box to change the reference data and to define the cell formats used to display changed data.

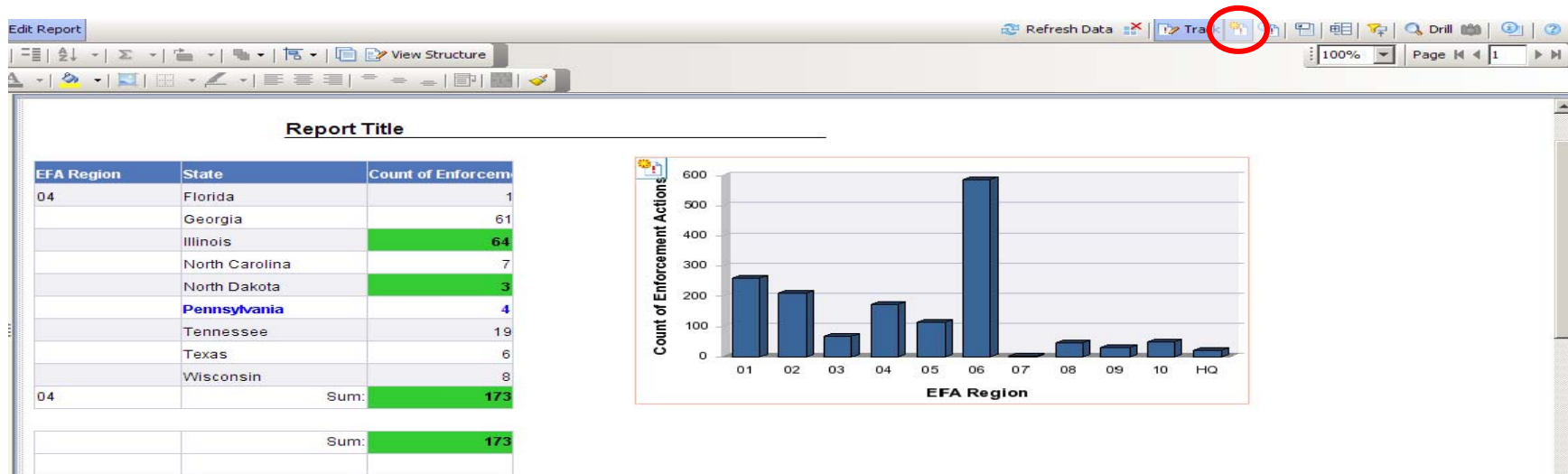
OK **Cancel**

Click 'OK' to apply changes.

To hide the changes in the data, click on the 'Hide Changes' icon and the data that is modified will not be highlighted.

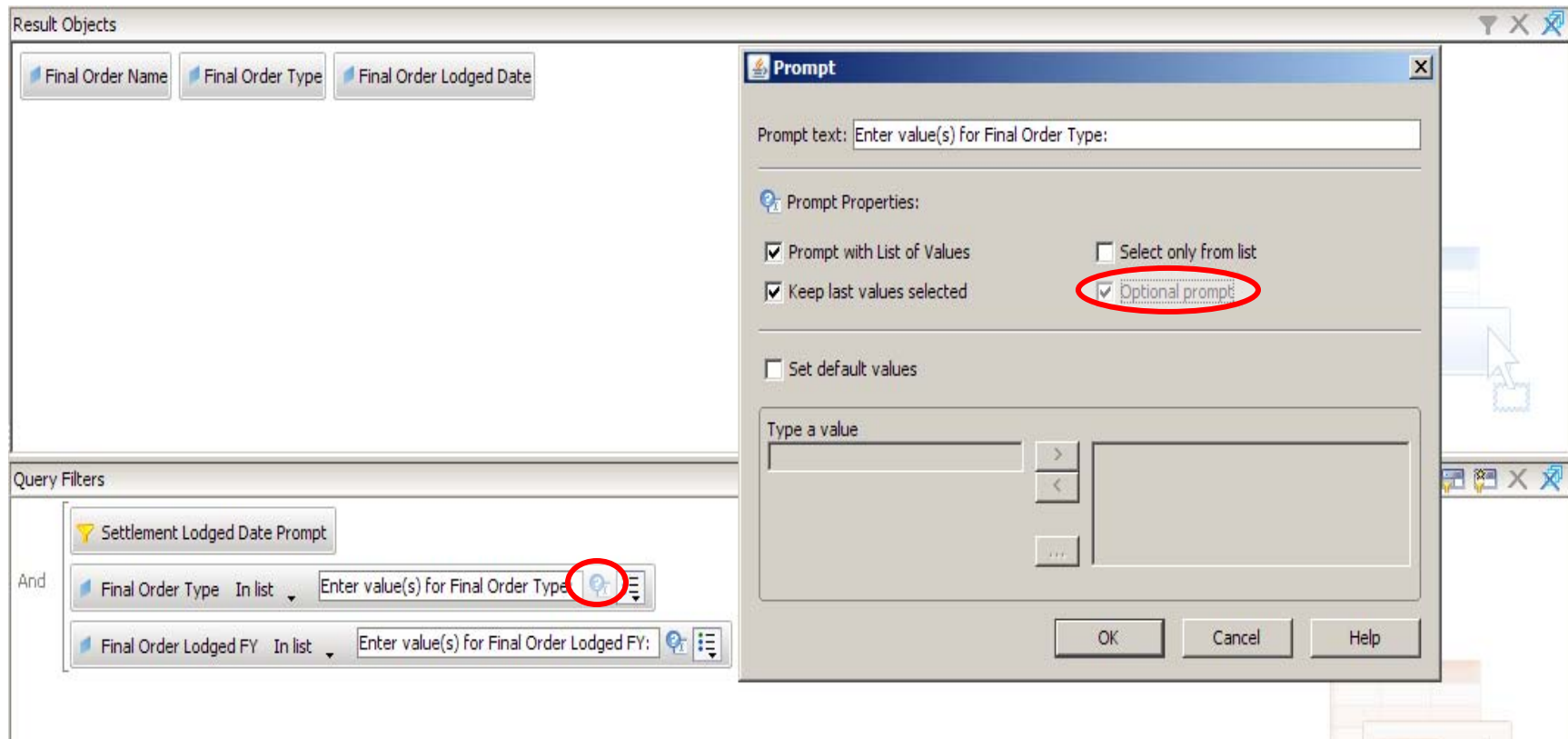


Clicking on the same icon (Show changes now) will differentiate the modified data.



5. Optional Prompts

The Optional Prompts does not require input if the user doesn't wish to filter on that selection. The optional prompt can be set only on the User-defined prompts. Click on the '**Prompt Properties**' icon and check the '**Optional prompt**' checkbox.



When refreshing the report, the Optional prompt will be removed from the query if no value is selected. This feature can help improve query performance and allow users to create reports that are more flexible.

Prompts

Select or type the prompt values for each prompt below.

✓

Settlement Lodged Date (MM/DD/YYYY): (Use * to select all.) **10/15/2009**

Enter value(s) for Final Order Type: (optional) If no value is selected, this filter will be removed.

✓

Enter value(s) for Final Order Lodged FY: **2010**

Type a value

Refresh values

EFA Identifier Fiscal Year

2010
2009
2008
2007
2006
2005
2004
2003
2002

Last Refresh Date: October 19, 2009 12:38:03 PM...

Enter your search pattern

>

<

Enter value(s) for Final Order Lodged FY:

2010

Run Query

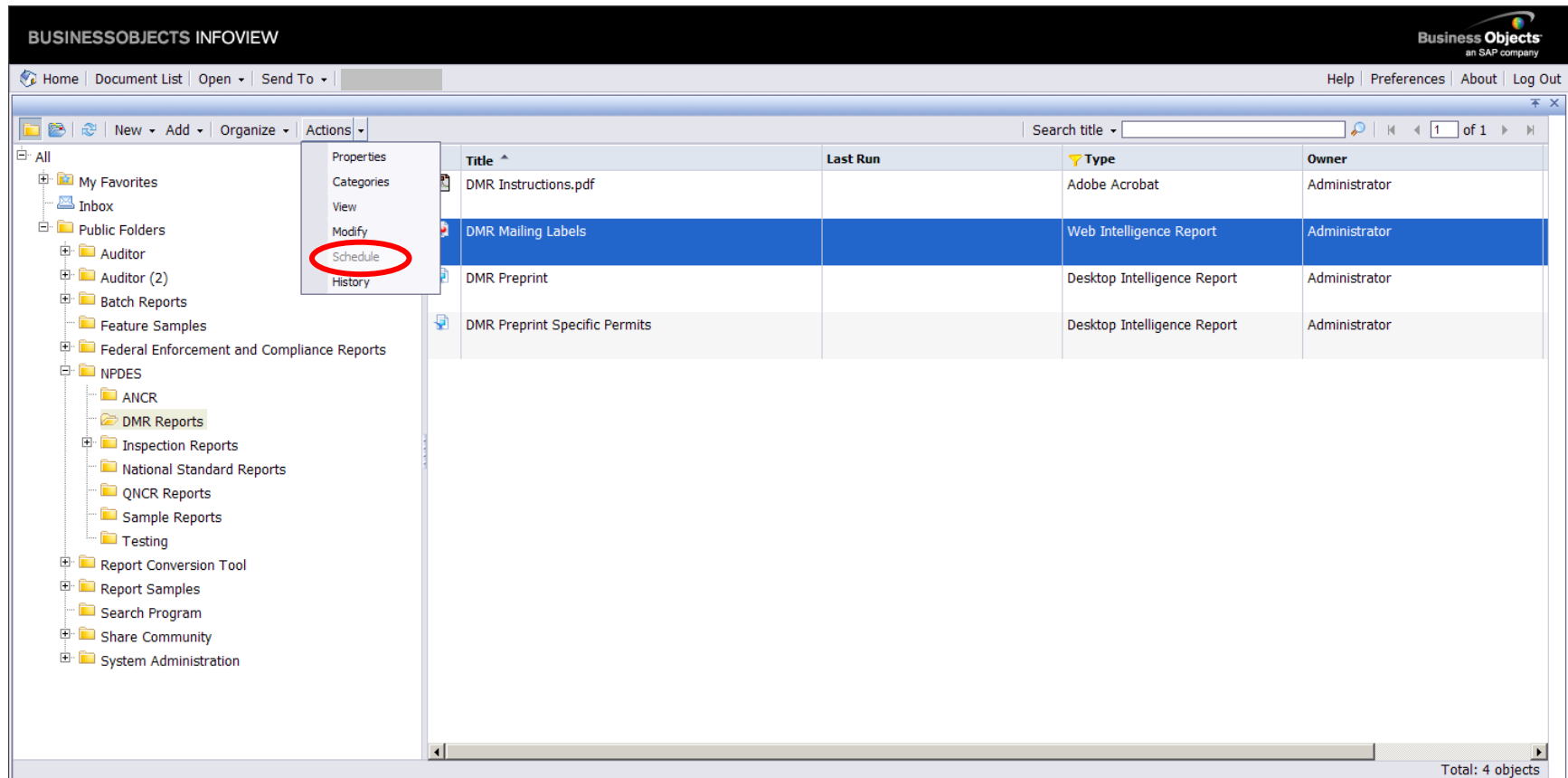
Cancel

Scheduling a Report

Select the report that needs to be scheduled and click on **‘Actions’** and select **‘Schedule’**

OR

Right click the report and select **‘Schedule’**



Set the parameters and enter prompt values if there are prompts present in the report.

BUSINESSOBJECTS INFOVIEW

Home | Document List | Open | Send To

Help | Preferences | About | Log Out

Schedule

Instance Title

Recurrence

Prompts

Formats and Destinations

Caching

Events

Scheduling Server Group

Instance Title

DMR Mailing Labels

BUSINESSOBJECTS INFOVIEW

Home | Document List | Open | Send To

Help | Preferences | About | Log Out

Schedule

Instance Title

Recurrence

Prompts

Formats and Destinations

Caching

Events

Scheduling Server Group

Recurrence

Run object: Now

Object will run

Now

Once

Hourly

Daily

Weekly

Monthly

Nth Day of Month

1st Monday of Month

Last Day of Month

X Day of Nth Week of the Month

Calendar

BUSINESSOBJECTS INFOVIEW

Home | Document List | Open | Send To

Help | Preferences | About | Log Out

Schedule

Instance Title

Recurrence

Prompts

Formats and Destinations

Caching

Events

Scheduling Server Group

Prompts

Modify values - for DMR Mailing Labels

A. Beginning Monitoring Period End Date(MM/YYYY):

B. Months to Print

C. Major/Minor Indicator(s):

D. NPDES ID(s): (Use * to select all.)

E. Permitted Feature ID(s): (Use * to select all.)

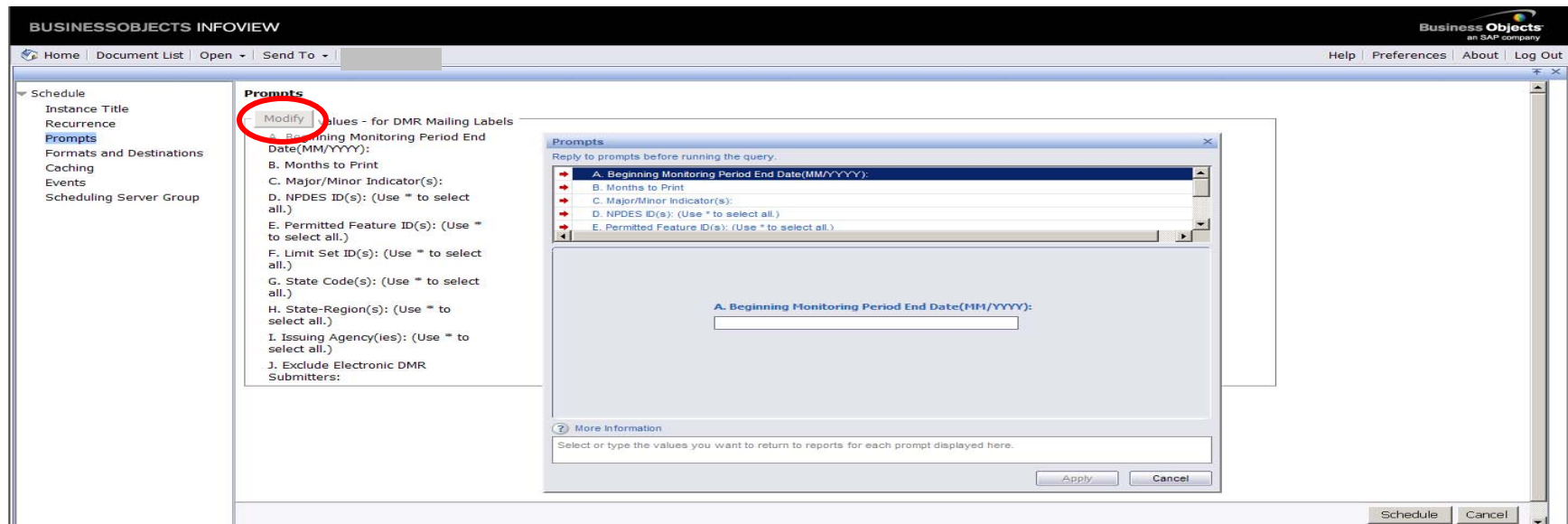
F. Limit Set ID(s): (Use * to select all.)

G. State Code(s): (Use * to select all.)

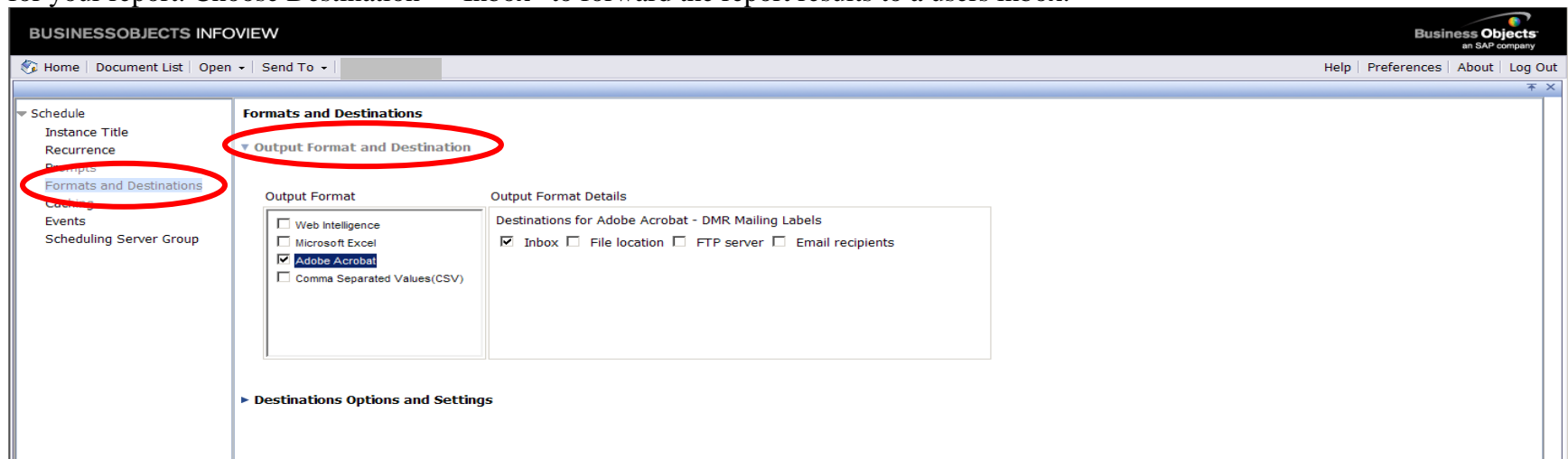
H. State-Region(s): (Use * to select all.)

I. Issuing Agency(ies): (Use * to select all.)

J. Exclude Electronic DMR Submitters:



Set correct Output Format for the report and provide the destination where it needs to be sent. Choose "Adobe Acrobat" as the format for your report. Choose Destination = "Inbox" to forward the report results to a users inbox.



Uncheck the 'Use the Job Server's defaults' to select users

The screenshot shows the 'Destinations Options and Settings' dialog box in the BusinessObjects InfoView interface. The dialog is titled 'Destinations Options and Settings' and is part of the 'Output Format and Destination' section. It contains the following elements:

- Destinations for the output format:** A list on the left with 'Inbox' selected.
- Options and Settings:**
 - ☐ Use the Job Server's defaults (This checkbox is circled in red in the original image.)
 - Choose:** A dropdown menu currently set to 'Users'.
 - Look For:** A text input field containing 'hqs1' and a 'Search' button.
 - Available Recipients:** An empty list box.
 - Selected Recipients:** A list box containing 'hqs1'.
 - Target Name:**
 - ☒ Automatically generated
 - ☐ Specific name: [text input field]
 - Send As:**
 - ☐ Shortcut
 - ☒ Copy
 - ☐ Cleanup instance after scheduling

At the bottom right of the dialog are 'Schedule' and 'Cancel' buttons.

Guidelines to Schedule Reports

Report should be scheduled if it meets any of the following criteria.

1. You anticipate that the report runs for more than 5 minutes.
2. You anticipate the report to generate at least 1000 pages.
3. The report is complex, i.e. if the information is retrieved from various subject areas, or if the report has complex formatting.
4. If you have never ran this report before and have no idea about how many pages the report might generate.

Resolution to Common issues

1. IE Settings - Downloading files

Issue:

Users get the following message when attempting to download reports from XI and they cannot download the report files:



Resolution:

1) From IE, go to Tools > Pop-up Blocker > Set to > Turn off pop –up blocker.
2) From IE, go to Tools > Internet Options > Click on Security Tab >Click Trusted Sites > Click “Sites” button and enter the following site.

https://*.epa.gov

2. Viewing Reports in PDF

Issue:

Users aren’t able to view reports in PDF, even when there preferences are set.

Resolution:

- 1) Close all Internet Explorer windows.
- 2) Open Adobe Acrobat Reader. Click Edit > Preferences.
- 3) Click **Internet** in the Categories column of the Preferences property sheet.
- 4) Choose **Display PDF** in browser check box.
- 5) Click OK.

3. Infoview – Schedule Properties

Issue:

Users see “Never Run” in the Last Run column when looking at their reports in InfoView, even though they have run the report.

Explanation:

The Last Run column is only for scheduled jobs. That column only changes from "Never Run" to a date and time-stamp if the report has ever been scheduled. The purpose of this column is for users to keep track of their scheduled jobs.

4. Webi – Setting the Desired Date format

Issue:

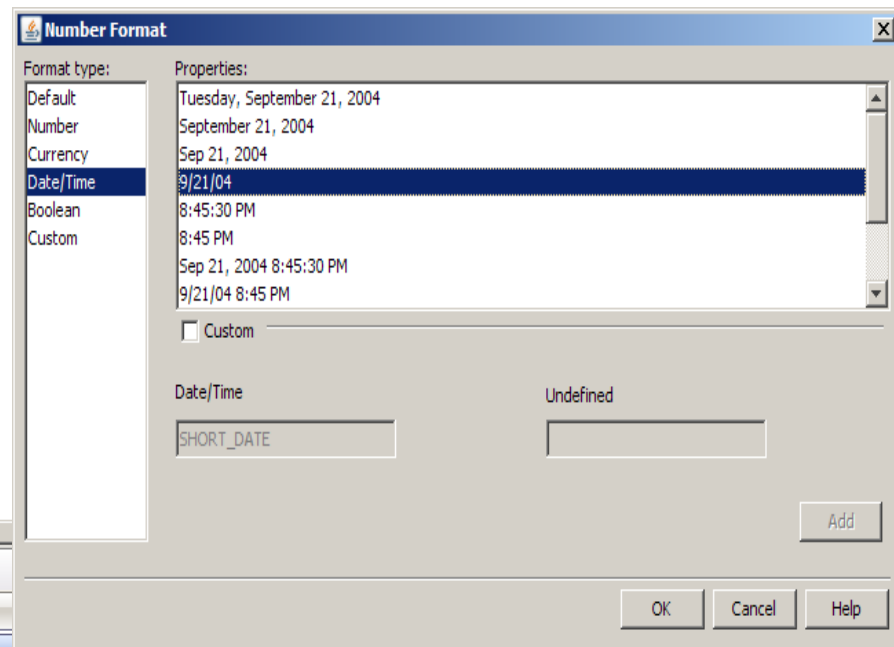
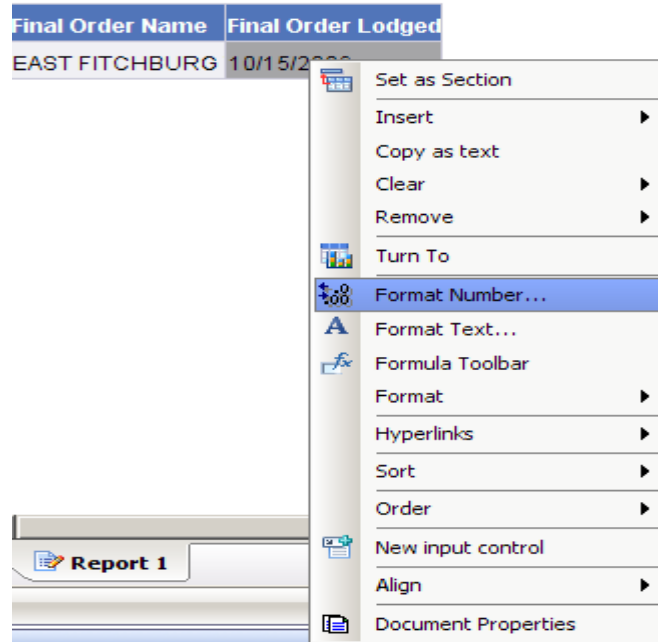
Users want to set the date format in reports to something other than the default

Resolution:

1) In the “Edit Report” panel in Webi, select the date column (including the values) you want formatted.

Final Order Name	Final Order Lodged
EAST FITCHBURG	10/15/2009

2) Right mouse click and choose “Format Number”.



3) Choose ‘Date/Time’ as the ‘Format Type’ .

4) Select the Date/Time format you want. (see screen shot below).

5) Click ‘OK’ to set the desired date format.

5. Web Intelligence Report Options

When there are multiple queries in the report, by default, Business Objects links the queries. Turn off the “Auto-merge dimensions” option in Document Properties to separate the queries.

- 1) In Web Intelligence, in the “Edit Report” tab, right click somewhere in the white space of the report.
- 2) Select Document Properties from the list.
- 3) Scroll down to Data Synchronization Options and un-check “Auto-merge dimensions”
- 4) This option will be turned off for the selected report only. You will need to turn it off for all other reports as needed.

The screenshot shows a Web Intelligence report titled "Sample Limit and DMR Data Report". The report contains a table with the following data:

NPDES ID	Version Nbr
GA0020222	0

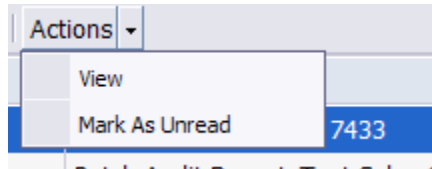
Below this is a green bar labeled "0B1-0". The main table in the report is as follows:

Parameter Desc	Mon. Loc.	Season	Start Date	End Date	Change of Limit Status Desc
Oxygen, dissolved (DO)	1	0	6/25/02	6/21/06	Base
Limit Values					
Limit Value Type Code	C1				
Limit Value Consolidation	6				
Limit Unit Short Desc	mg/L				
Statistical Base Short Desc	MINIMUM				
1/31/06					
DMR Value Type Code	C1				
DMR Val Concat	8.3				
DMR Value Received Date	2/10/06				
Number of Days Late					
Percent Exceedence					

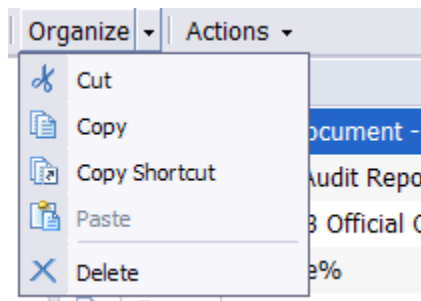
On the right side, the "Document Properties" dialog is open. The "Data Synchronization Options" section is expanded, and the "Auto-merge dimensions" checkbox is checked and circled in red. The "Extend merged dimension values" checkbox is unchecked. The "Report Order" section shows "Report 1".

6. Managing Reports

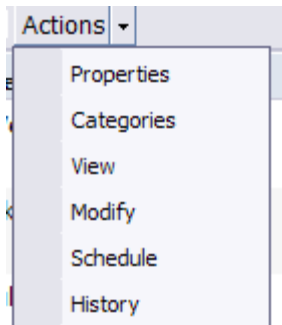
1. The reports in your Inbox have limited options such as ‘View’ to run the report or to “Mark as Read/“Mark as Unread”. If more options are needed such Schedule, Modify, etc., then move the reports to your Favorites folder.



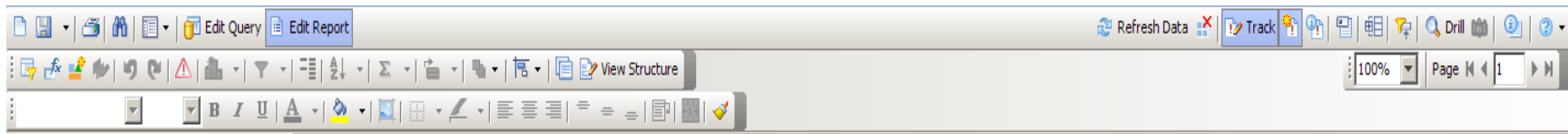
2. To move a report to your Favorites folder, select the report and click on Organize. From the Organize drop down menu, select “Cut” or “Copy”, then select “My Favorites” (or any subfolders you have created in your Favorites folder).



3. Click on the My Favorites Folder, and select a report and click on ‘Actions’ menu
 - **Properties** – Shows you when the report was created and modified etc. You can add description to the report in this view
 - **Categories** – Shows the categories to which the report is assigned or can be assigned
 - **View** – Runs the report
 - **Modify** – Launches WEBI to allow you to edit and run the report
 - **Schedule** – allows you to schedule the report
 - **History** – shows scheduled runs for the particular report



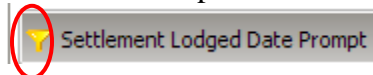
4. Click Modify to Open/Edit the report in WEBI, and you will see the tool bar below,
 - **Edit Report** - allows you to format the report, you can also Save the report from here
 - **Edit Query** - allows you to add objects to the query results and query filters, You cannot save from this window
 - **Track** – Tracks data for changes in the report when refreshed



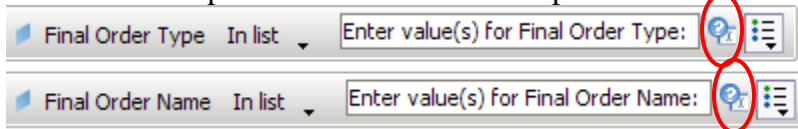
5. Clearing Prompt Values for WEBI Reports

For WEBI reports using “User Defined Prompts” the prompt values can be cleared so that each time the report is opened, the prompts are blank.

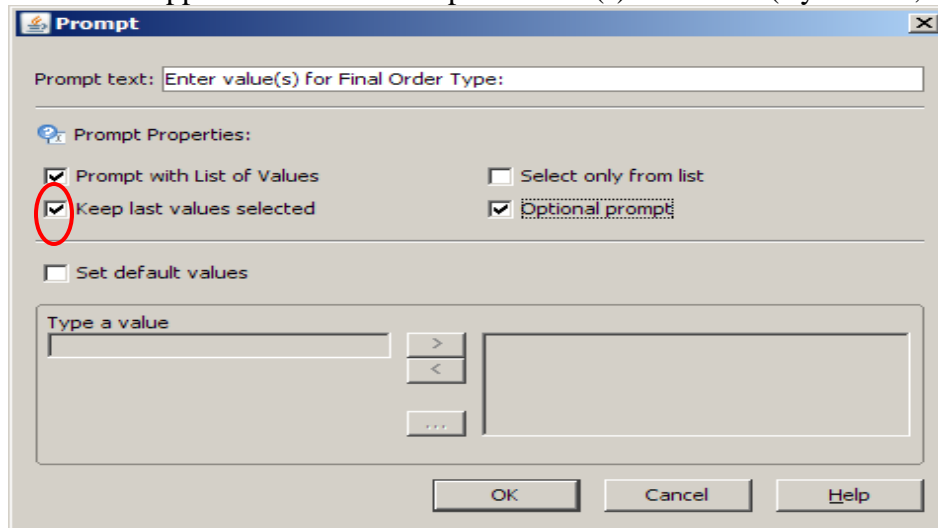
This is an example of “Predefined Prompts”



This is an example of “User Defined Prompts”

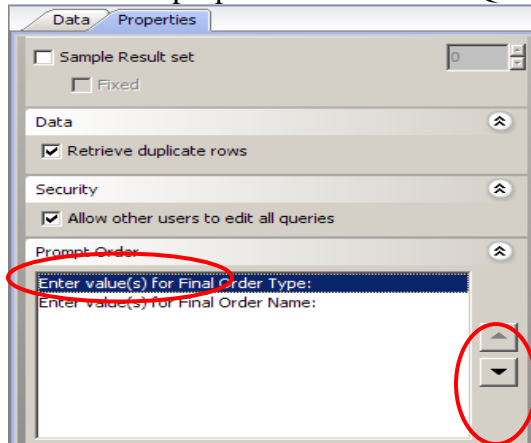


From the Edit Query Panel in WEBI, for each user defined prompt in the report, click the icon circled in red above. The box below will appear. De-select “Keep last value(s) selected”. (By default, this is selected). Save the report.



6. Changing the order of the User defined Prompts in WEBI Reports

Click on the properties Tab in “Edit Query” panel and scroll down to the “Prompt Order” section.



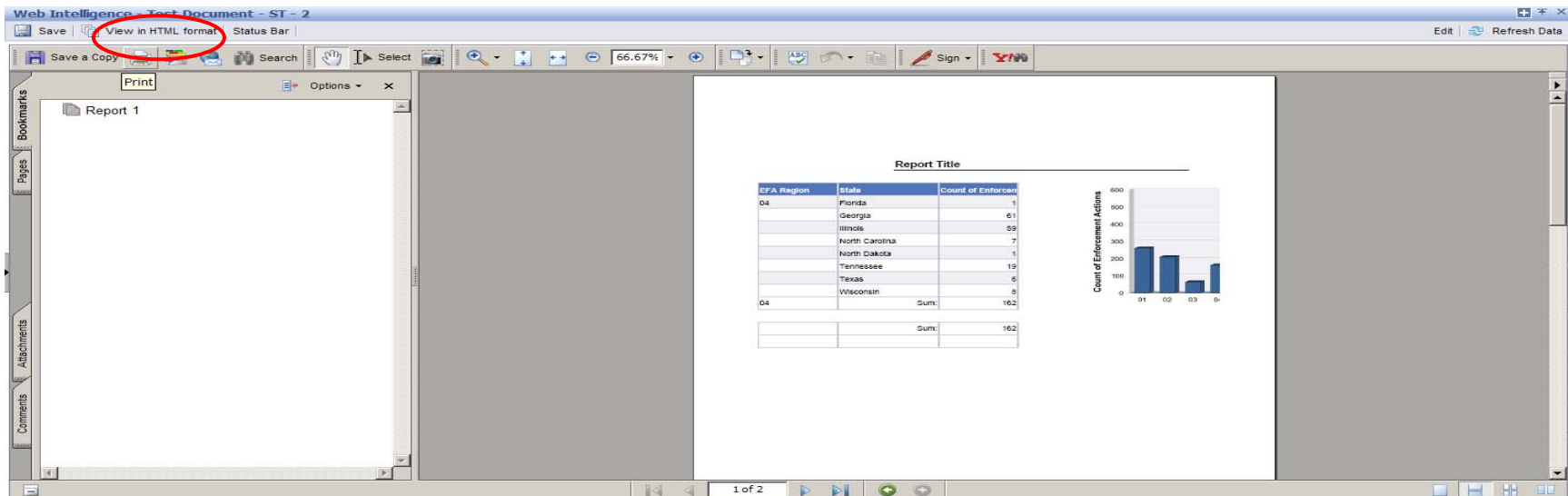
Select the prompt and move up or down using the arrows keys to set the order of display.

7. Saving Report Results to CSV file

- CSV file can be saved only when the report is viewed in HTML.
- Saving to .CSV file is not available if the report is viewed in PDF mode.

Below are the steps to save the results of a report as .CSV file type.

1. Run the report in InfoView.
2. Toggle to view in “HTML Format” (if your default is to view in PDF).



3. Click on Document menu → Save to my computer as → CSV to save the results into .CSV file.

